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L4: Entry 2 of 2

File: USPT

Oct 29, 1996

DOCUMENT-IDENTIFIER: US 5570291 A

TITLE: Custom product estimating and order processing system

Brief Summary Text (5):

Manufacturers of business information products such as forms and labels generally employ a number of sales representatives located both at the corporate office(s) and offices remotely located therefrom. The sales representatives interact with customers, that is, businesses requiring office supplies such as forms and other products for recording and distributing business-related data, to determine the format and content of a form, label or other product which best suits the customers' data collection and management needs. Following form design, the sales representative generates an order to specify the number of forms to be printed, form size, paper quality, ink color, print type, number of plies, requested shipping dates, and fastener type, among other information. Order generation is typically a manual process for the sales representative. Thus, the customer interaction process can be arduous and time-consuming because of the multitude of options that are considered when designing and ordering a form.

Detailed Description Text (28):

The memory storage device(s) at the sales office 12 (e.g., the file server 66 and the laptop computer 41) preferably store information that is needed only at the local levels such as user information and modem numbers, as well as information that is generated at the local level such as item specification information. The item specification can be for both items that have and have not been transmitted to the SQL server 36 at the corporate office 16. These sales site memory device(s) can also contain information that has been downloaded from the corporate office SQL server 36. As will be described in further detail below in connection with FIG. 4, the sales office computers (whether located at a customer site or corporate sales site) are programmed to generate release orders, to generate and transmit item specifications and requests for estimates, to receive estimate data and convert an estimate into a production order, to generate and transmit a production order to the corporate office, and to perform messaging.

Detailed Description Text (41):

With reference to the affirmative branch of decision block 148 and block 150, review of an estimate, for example, by an estimating department or operations and sales management department is advantageous for a number of reasons. Sales and operations management personnel can review estimates using various parameters when the estimates require use of a special material, a particularly large volume of material, or require complex construction or a new or special specification. Estimates which involve a particularly high dollar value or a particular customer can also necessitate review by corporate office personnel. This gives corporate office personnel an opportunity to use pricing information for processes that is external to the Estimating subsystem 90. For example, while a mailer product with six plies can be priced by the Estimating subsystem 90, the item can present difficulties to the plants. Batch validation of an item specification and estimate for the mailer allows corporate office personnel to review the estimate and make changes as needed. Batch validation also allows estimates for strategic customers or which exceed a predetermined dollar amount to be identified for review.

Detailed Description Text (46):

As shown in block 166, each computer at the sales office preferably operates in accordance with the SIN 86 to validate production order details, as well as cross-validate selected items with reference to the production order details. The personal computer is also programmed to determine whether or not a customer has a contract with the manufacturer, to ensure the customer has a favorable credit status and to check for a concession percentage. The SIN 86 also stores in memory a version of the estimate used to produce the production order as part of an audit trail. The sales site computers are further programmed to prevent expired estimates from being

converted into production orders, to ensure that each production order is linked to a particular estimate unless the order is the result of an outside purchase, as well as to check for concession percentage level. The latter feature enables sales management to be notified when acceptable concession levels are disregarded.

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